DOCUMENT RESUME

ED 338 925 CE 059 751

TITLE	Volunteer Training Manual. Bureau of Home Health and Long Term Care.
INSTITUTION	South Carolina State Dept. of Health and Environmental Control, Columbia.
PUB DATE	91
NOTE	78p.
PUB TYPE	Guides - Non-Classroom Use (055)
EDRS PRICE	MF01/PC04 Plus Postage.
DESCRIPTORS	Adult Education; Community Health Services; *Home Health Aides; Occupational Information; Personnel Selection; *Program Development; Public Policy; Recruitment; *State Programs; *Voluntary Agencies; *Volunteers; *Volunteer Training
IDENTIFIERS	*South Carolina

ABSTRACT

This manual is intended to help human services agencies to create home care volunteer programs. The manual is organized in nine sections. The first section provides initial information about volunteer programs that agencies should consider before starting a program. It is followed by two sections that provide an overview of the program's structure and benefits and some ideas on designing a volunteer program, specifying volunteer activities, and defining volunteer roles. The fourth section suggests methods of recruiting and selecting volunteers, and the fifth section outlines ways of managing volunteer activities. Section 6 describes volunteer orientation and training, and section 7 includes general information on volunteer programs, including sample job descriptions. South Carolina policies regarding volunteer programs are outlined in the eighth section. The final section consists of 16 forms to be used in a volunteer program, such as volunteer agreements, a code of ethics, a home management consent form, a volunteer evaluation form, a time sheet, and a monthly service report. (KC)

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DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL

Bureau of Home Health and Long Term Care

VOLUNTEER TRAINING MANUAL

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BEFORE YOU GET STARTED

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Developing a home care volunteer program can be a rewarding and enriching experience. It is also a lot of work initially but once operational, the program activities become part of the work routine of the department.

This manual is intended to help you put the activity in perspective and provide guidelines as to responsibilities of the different parties involved. Also included are forms which will be utilized in the volunteer program.

Organizational Attributes

The home care programs which will be most successful in implementing a volunteer program will possess attributes such as:

1. A strong commitment to incorporating volunteers into their routine operations;
2. Treating the volunteers as normal (if not paid) staff and managing them accordingly
3. A broad base of community support and trust
4. A balance of authority and responsibility precluding volunteers from "stepping on someone else's toes"

Collectively, these attributes seem to provide a positive environment for the volunteer program.

Good Volunteer Program Attributes

Good volunteer programs seem to have several common characteristics.

1. Strong project direction
2. Simple program structure
3. Well thought-out course of action
4. Recruitment of competent volunteers
5. Well organized training activities for volunteers
6. Established techniques for managing volunteers effectively
7. Close coordination of volunteers with all department staff
8. An active community awareness function to communicate the availability of the volunteer services

Volunteer Recruitment

In almost every community there are capable people who are interested in serving as volunteers. Obviously, they have different skills which will need to be matched with the department's requirements.

Recruting for volunteer should not be considered too differently from recruiting paid personnel. Successful efforts demonstrate the need for:

1. Developing and advertising a specific position description
2. Carefully interviewing candidates
3. Familiarizing candidates with pertinent policies and procedures

4. Setting forth expectations (such as dress and attendance requirements)
5. Acquainting candidates with their roles and supervisory personnel

The success of the program depends on the attraction of qualified volunteers. This is why the recruitment process is vital.

Volunteer Training

Successful volunteer programs provide on-going training for their personnel. The volunteer's specific talents and abilities initially lead them to a working relationship with Home Care. However, there is a benefit and a need to provide continual training. This usually includes an initial orientation, some specialized training in specific area assignments, and periodic in-service training.

Managing Volunteers

One of the most important aspects of operating a volunteer program is a strong management component. Volunteers are a resource which if not properly applied will be of little benefit. Likewise, volunteers want job satisfaction as much as their paid counterparts.

Your volunteer program will be more successful if you:

1. Make appropriate assignments
2. Schedule volunteer work
3. Evaluate performance and volunteer satisfaction
4. Hold periodic staff meetings
5. Provide supportive supervision
6. Maintain appropriate record keeping systems (i.e. time, expenses, training, attendance, etc.)

Often these types of management systems will already be in place and can simply be expanded to include the volunteers. The critical point is to make volunteers feel they are a part of the Home Care program and not a separate department.

Client Acceptance

Volunteers are usually well received by the clients if the staff takes time to:

1. Thoroughly screen candidates during the recruitment process
2. Integrate the volunteers into the normal operation of the Home Care program
3 Introduce the volunteer to the client in a positive manner
4. Maintain a "watchful eye" and be responsive to client's concerns
5. Ensure the community awareness function informs clients and the community at large about the volunteer program and services

Professional Acceptance

Depending on the services provided by the district and the volunteers' assignments, the degree of volunteer interface with professionals will vary. Most experiences have been very positive in terms of the professional acceptance of the volunteer's contributions. This is usually the result of careful planning of how the volunteers will be of service and communicating this to the professionals on staff and elsewhere in the community.

Cost of Volunteerism

A successful volunteer program benefits the Home Care program by providing, in essence, inexpensive labor. But there are some costs depending on how the program is organized and individual district policies. These might include:

1. Volunteer's physical exams
2. Liability insurance
3. Stipends
4. Meal supplements
5. Recognition functions and materials

Initially, the department will invest some additional time in recruiting, training, supervising and generally working with the volunteer. However, these costs are considerably less than the return.

OVERVIEW OF PROGRAM

How To Use This Manual

The remainder of this manual is comprised of segments which give the reader an overview of the program's structure, benefits of a volunteer program, the activities involved in designing a volunteer program and tailoring it to fit your needs, how to recruit, select and enroll the volunteers and a method for managing the volunteers while they are with Home Care.

Throughout this manual every attempt has been made to provide you with an easy reference to volunteer programs and the forms necessary to implement one here in Home Care.

Overview Of The Program

This volunteer program is designed to be community based in origin. The rationale for this is the fact that the local community level is generally the vast focal point for delivery of our services. Also, the necessary relationships of community organizations to implement home care usually exist already. The volunteer program can be coordinated with a variety of interested organizations in the community such as senior citizens' programs, etc.

The volunteer program is based on the concept that the home care department personnel are too often over-burdened as a result of resource/funding allocation, and that in many areas there are qualified individuals who would welcome the opportunity to contribute some of their time to aid their fellow citizens. The decision on how best to organize and utilize volunteers is a prerogative of each Home Care office. However, volunteer services should be provided as an adjunct to current routine activities of the department or on an outreach basis. Volunteers can work directly with clients on their behalf or in some less restricted manner.

Program Structure

How the volunteer program is structured will be influenced by the existing Home Care operations. The program should supplement the activities of the department and help stress the established networks with other health and social service programs to provide services.

Generally speaking, the home care department should structure the volunteer program recognizing two responsibilities. The first is to ensure that the services received by the clients are appropriate to address their individual needs. The second is to ensure that the volunteers receive the supervision and support they need to perform their duties.

Day to day operation and administration is provided by the volunteer coordinator. The individual personnel assignments will probably coincide with the existing organizational structure. However, the number of active volunteers may become substantial as the program matures resulting in the need to assign a coordinator to manage the program.

Program Benefits

A volunteer program benefits the Home Care department, the clients, and the volunteers themselves. Specific benefits to the department may include:

1. Providing additional personnel during peak and seasonal hours
2. Relieving the administrative burden on health care and social service providers
3. Helping enhance the community image
4. Alleviating some of the burden resulting from budget cuts
5. Providing services for special projects

The clients benefit from the volunteer services as well. In addition to direct patient contact, their access to services is expanded and they have an increased awareness of personal attention. The clients have someone who is assigned to them who can be called to answer questions about home care operations, procedures and services.

The volunteers benefit through their service. For some it will be a continuation of activity after retirement maybe even in a similar field. For others, it will be an opportunity to explore new careers. Many see this as their opportunity to contribute in their community. Primarily, their reward will be in knowing their's is a valuable contribution.

DESIGNING YOUR VOLUNTEER PROGRAM

DESIGNING YOUR VOLUNTEER PROGRAM

The design of your volunteer program will be a joint effort of your health district and the Central Office Volunteer Consultant. Included in this section are some of the parameters to be considered prior to the establishment of a program.

Identifying Program Parameters

Research is needed to determine the volunteer program parameters appropriate for your Home Care program. Items to be considered are:

1. What geographic area will be served?
2. How prevalent is the need for a volunteer program?
3. How can volunteer services best be utilized?
4. Will additional support services will be needed?
5. What duties will the volunteers be able to perform?

There are a few resources that can assist in determining services, area and needs. The first is through staff discussion of how volunteers can be incorporated in the Home Care program. Generally, the individuals currently doing the work best understand how the volunteers would benefit the clients served in their areas. These discussions can be held individually or in a group setting, depending on the dynamics of your department.

Additional information can be developed from workload data by reviewing case files. This will help in developing an overall profile of the amount of activity of each program (home health and personal care) for which volunteer participation is needed.

It is also possible that there will be other community agencies (Council on Aging, DSS, etc.) whose input may be valuable to your program. This will also provide an excellent opportunity to promote the volunteer program, and identify additional support for it.

Identifying Existing and Compatible Services

It is beneficial to identify existing resources and establish working relationships and/or information referrals to aid the volunteers in performing their assignments. Much of this type information may already be known to your staff. The information is more likely to be used if it is organized in a directory format listing the organization, types of services provided, eligibility requirements, and contact person. The directory can then serve as a ready reference for volunteers and supervisors.

Specify Volunteer Activities

There are many activities volunteers can perform in the home care setting. When deciding how the volunteers will participate, you should focus on those activities that will enhance the work of your professional staff as well as fulfill the interests of the volunteers. Sample job descriptions are included

in this manual as a guideline for utilization.

Sometimes volunteers are recruited from among retired health professionals such as physicians, nurses or social workers. The majority are interested, well meaning citizens who want to help but have not been trained in the health care or social services field. Consequently, the following activities are usually inappropriate for most volunteers to undertake:

1. Making medical or other professional judgments
2. Diagnosing client needs
3. Providing information not prepared or approved by your professional personnel
4. Administering or distributing medications
5. Relating confidential information about client's circumstances to unauthorized personnel
6. Assuming an authoritative attitude when dealing with clients

You can use these parameters in defining the role of volunteers. Each volunteer activity will need to be carefully reviewed to determine the appropriate participation by the volunteer.

Define Personnel Responsibilities

The characteristics of each home care department vary as does the operating environments. These characteristics decide in part the participation of your personnel in the volunteer program. Usually, your personnel will consist of the volunteer liaison, your volunteers and any other supervisory personnel you wish to include. Candidates for the volunteer liaison may be selected from the following personnel:

1. administrative/administrative support personnel
2. health educators
3. nursing personnel
4. social services personnel

If a selection from these categories is not possible, you may elect to recruit and train a volunteer to handle many of these responsibilities. It is recommended that the liaison be positioned within the administration to ensure:

1. an overall perspective of the program
2. organization-wide authority for the program
3. close coordination of the program with management
4. high program visibility

The volunteer coordinator will be responsible for the daily management of the volunteers. The specific duties will be influenced by the characteristics of the district and the individual requirements of the program.

Volunteer Responsibilities To Clients

Whatever specific services you decide the volunteers will provide, they also have some basic overall responsibilities as they perform their work. If these basic responsibilities are observed, the success of the volunteers' work will be enhanced.

Attitude Toward the Client

The volunteer may be working very closely with the Home Care clients. It is critical that they develop and maintain a spirit of respect and appreciation for the client's circumstances and the individual as a person. How the clients are treated will affect their continued interest and participation.

Communications

Much of the volunteers' activities will be to communicate information to the client and to others. Whether this information consists of types of services provided, an orientation to community on home care or an invitation to join the volunteer program, the communication must be successful. It is imperative they have accurate information and be able to communicate it effectively.

Education

Although closely related to communication, the issue of education requires special mention. The volunteers are often responsible for promoting, among the clients, a real understanding of health issues. Furthermore, they should stress the importance of incorporating this information into the client's lifestyle. The education techniques must be appropriate to the families the volunteers serve.

Networks

Specialization of services has become a reality in most communities. Volunteers should be aware of opportunities and services provided by other agencies within their communities so as to make their clients aware of available options.

Client Confidentiality

THE NEED FOR CLIENT CONFIDENTIALITY CANNOT BE OVERSTRESSED. As the volunteers perform their duties, they may encounter information of a confidential nature about their clients. Such confidential information must remain just that, within the limits of good sense and the law. The need for client confidentiality should be stressed during volunteer recruitment and training, as well as throughout their participation.

Volunteer Responsibilities to Management

The volunteers will also be responsible to the management team when performing their duties. These responsibilities encompass:

Functioning Within Well Defined Limits. The volunteers work as your adjunct personnel. They represent Home Care within the communities. As such, they should receive and accept supervision. You should delineate the specific limits for their activities.

Attending Periodic Training Activities. You will need to provide periodic training for the volunteers. This will begin with an orientation program at the time of recruitment to familiarize them with your district, their work location, and what is expected of them. In addition, other training activities will probably be conducted to keep the volunteers current on program activities and special subjects. Each volunteer is required to attend these sessions.

Reporting. Your administration is responsible for managing program funds and reporting program activities. The volunteers should assist by reporting their time and incurred expenses within the limits you establish.

Scheduling. Your personnel will be managing and supervising the volunteers. It will be necessary to carefully schedule their activities to ensure their availability when needed. The volunteers should be responsible for maintaining their personal schedules, and punctuality should be discussed during their recruitment. Home Care personnel can help to ensure that the volunteers meet these responsibilities by carefully selecting and screening recruits, monitoring volunteer activities and conducting periodic training activities.

VOLUNTEER RECRUITMENT AND SELECTION

VOLUNTEER RECRUITMENT AND SELECTION

Once you decide how the volunteers will be used, you can begin the recruitment process. This usually requires developing a recruitment campaign, devising alternative recruitment techniques, selecting from among the applicants who apply and enrolling the volunteers.

Develop Recruitment Campaign

Recruitment is an important activity and must be conducted carefully to ensure the most appropriate individuals serve as volunteers. Decisions should be made as to who will participate in the recruiting process, and how it will be accomplished. A variety of techniques can be used to recruit volunteers. Some are aimed at reaching a broad audience, others are target-specific. The use of each depends on the availability of recruitment resources and the difficulty with which potential volunteers can be identified.

The following recruitment strategies have proven effective:

1. Presentations to religious and civic groups and other communities
2. Recruitment through agencies and organizations which maintain lists of individuals interested in volunteerism
3. Media publicity including position advertising, agency newsletters, newspaper articles, public service radio or television interviews or spot announcements
4. Personal contact with potential candidates
5. Continued recruitment through candidate identification by volunteers initially enrolled

Identify and Interview Candidate Volunteers

The crux of the program is the supervised non-professional role played by the volunteers. In summary, the volunteers will be assisting Home Care, whether it be providing assistance to the client or to the department personnel.

There should not be any enrollment barriers for volunteers relating to experience, education, race, sex, religion, national origin or political affiliation. To qualify as a volunteer, a person should meet such criteria as:

1. Be able to record information received by clients
2. Be capable of serving assigned persons with special or exceptional needs on a personalized and regular basis
3. Be physically able as determined by a physical examination prior to assignment and annually thereafter
4. Be willing to accept supervision
5. Understand and accept their responsibilities to the client and their supervisor

Volunteer recruitment will be a major, intensive activity during initial stages of program development. Decisions should be made as to who will be involved and how long it will take to complete the recruitment process.

After an expression of initial interest, candidate volunteers should be scheduled for interviews as soon as possible. The first meeting should take place in comfortable surroundings, be private and confidential, and allow adequate time for discussion. Meetings in the volunteer's home and/or the Home Care office are appropriate. Interviewers should relate to the particular backgrounds, hobbies, and interests of the applicants.

An overall description of the Home Care program, organization, and specific volunteer needs should be provided during the interview. These topics might be included in the initial interview:

1. Role and types of activities performed by volunteers
2. Description of where the volunteer will be working
3. Special needs of the clients to be served by the volunteer
4. Distances and available transportation to and from volunteer's work locations or private residences
5. Orientation and in-service meetings
6. Volunteer personnel policies (attendance, sick leave, vacation, etc.)

A second interview may be conducted after it is determined where the volunteer will be working. This will provide supervisory personnel an opportunity to meet the volunteer and discuss the specific nature of their future association, activities and work place.

The interview should include a written application (See Forms for sample). It is sometimes beneficial to have the interviewer fill out the form with the applicant. The forms should be kept in the volunteer's personnel file.

Select Volunteers

The criteria to serve as a volunteer should be carefully considered. Priority should be given to persons who are highly motivated and with the greatest ability and interest. Other selection criteria should include a willingness to accept supervision and determination that the applicant has the necessary attitude to develop a supportive person-to-person relationship with the clients on a regular basis. Special needs or circumstances of the clients will sometimes affect selection of either male or female volunteers. Eligible persons not selected to serve as volunteers should be advised of the fact and referred to other agencies which provide volunteer opportunities. A limited number may be used to form a substitute list to be used for volunteers who are ill or on leave.

Enrolling Volunteers

Once the selection process is completed, volunteers should be formally enrolled. The staff should prepare an enrollment record form which includes information such as:

1. Address
2. Date of Birth
3. Next of Kin or Emergency Phone Number
4. Ownership of Automobile (To include a signed Volunteer Transportation form and all requested information - see "Forms")
5. Statement of Intention to Use Private Vehicle On Assignments
6. Physician's Report (to ensure the volunteer is able to serve without personal determent or detriment to clients) and a Statement of Limitation of Services when appropriate

You may also wish to use the Volunteer Service Agreement (see "Forms") to formally enroll the volunteers. This is useful because by signing it, the volunteers enter into an agreement which highlights the importance of their involvement in our organization. You may also wish to have them sign a copy of the Volunteer Code of Ethics (see "Forms").

Recruitment and selection of volunteers can become a continual process if you experience rapidly expanding services or high rate of volunteer turnover. Eventually a full complement of volunteers will be established, permitting the supervisors to establish an effective team.

MANAGING YOUR VOLUNTEER PROGRAM

MANAGING VOLUNTEER ACTIVITIES

Volunteers are most effective when their activities are carefully managed and designed to complement your personal staff. The management functions should address the appropriate service assignments, training, scheduling, transportation, planning and evaluation. Training activities will be addressed in a separate section.

Volunteer Services to Clients

The potential range of volunteer services were described earlier. This section addresses services to individual clients.

When working directly with your clients, it will be necessary for your personnel to review each client's needs to determine exactly what services will benefit them and make the appropriate volunteer assignments. A simple format for documenting the client assistance plan can be found in the section "Forms". The plan should be reviewed and revised periodically.

After individual client assistance plans are prepared, your personnel may wish to review the plans and combine them to establish the overall need for direct volunteer services. A form is included to summarize volunteer activities. This will facilitate volunteer assignments and management of their activities. For example, several clients may require similar services such as transportation. These activities can be scheduled to one volunteer willing to perform this task if sufficient volume merits. Your personnel may prefer to assign a volunteer to work directly with each client's full range of needed assistance.

Assignments should be meaningful and rewarding to both the volunteers and the clients they serve. The following scheduling parameters can be used to achieve this:

1. Assignments and terms of service, including the service schedule, should reflect individual volunteer's preference and capabilities. You should provide a range of service opportunities to permit a choice
2. Volunteers who function best in a relatively unstructured environment may welcome the freedom to provide supportive services to clients in their homes. Others may prefer person-to-person service with more carefully structured activities
3. Assignments should be focused to maximize the use of the volunteers' time. This can be accomplished by identifying common service requirements set forth in the assistance plans and determining the amount of volunteer time required.

Scheduling Volunteer Services

There are two scheduling activities, both of which require referring to the client assistance plan. The first is to develop individual schedules for those volunteers working directly with clients.

Secondly, a summary schedule can be prepared to schedule volunteers working in the service location (Home Care office). The primary consideration should be given to identifying the needed range of services (nutrition counselling, homemaking, respite, therapy assistance) from the individual client assistance plan.

The schedule should be prepared on a bi-weekly or monthly basis depending on the needs of the district. As each new schedule is prepared, the volunteers' activities should be assessed to be certain the planned services were provided. In an instance where they were not, an acceptable explanation should be provided by the volunteer. This permits realistic updates of the schedule and client assistance plan. It also provides an ongoing evaluation of volunteer performance.

Transportation and Related Issues

Districts may wish to arrange or provide volunteer travel between their residences and places of assignment, including recognition activities, orientation and training sessions and in-service meetings. When transportation is not directly provided, volunteers may be reimbursed for out-of-pocket transportation expenses within the limitations prescribed by DHEC policies.

Reimbursement, Transportation, Accounting and Liability Insurance

Just as in any other agency program, the expenses related to the volunteer program staff and operations must be identified, appropriate funding provided and state government accounting procedures followed. Once the administration determines the staff and operational support, other funding considerations must be addressed. The Volunteer Act authorizes agencies to provide volunteers with such incidental reimbursements as it finds appropriate to assist them in performing their duties. It allows specifically for transportation mileage reimbursement, a meal allowance and liability insurance.

Volunteer reimbursement policies must be established by the districts and procedures developed which are compatible with the Statewide Accounting and Reporting System (STARS). Incidental expenses related to recognizing and supporting volunteer use must be consistent with allowable expenses covered by state law and accountable by STARS. The following information is designed to assist districts in these areas.

Reimbursement for Travel Expenses

The Volunteer Act permits a state agency to reimburse volunteers for mileage when utilizing their personal vehicles or transportation in the performance of their duties. However, they cannot be reimbursed for travel to and from their volunteer job. If the agency does provide reimbursement for travel, the volunteer is subject to the same state travel regulations as a state employee. All volunteers should be given copies of the State Travel Regulations as issued by the Comptroller General's Office. In addition to the Comptroller

General's regulations, our agency may have additional procedures which must be followed. The Volunteer Consultant and the District liaison will include these in the training for volunteers and staff, and the volunteer will be responsible for submitting the appropriate agency support documents. DHEC form number 178 "Monthly Travel Report", using class code 52122, should be utilized for proper reimbursement.

Volunteer policies stipulate that the volunteer may not accept additional reimbursement or payment from the client or other individuals who may be accompanying the client. Violation of this policy may result in dismissal.

The South Carolina Motor Vehicle Management Manual specifically states that non-state employees such as students, volunteers, contractual services personnel may be permitted to operate state-owned vehicles only if such operation is on official business of the State, is within the insurance coverage provided on the vehicle and is authorized by the agency or district. The manual further states that non-state employees who operate the vehicle will be offered the same protection as state employee operators if they meet the provisions stated above.

Reimbursement for Meals

The Volunteer Act allows for meal reimbursement to volunteers if travel extends over an established meal and/or lodging period. DHEC code 52122 allows for expenditures for non-state employees for transportation, mileage, board, lodging and other legal charges necessary in the performance of their services. Volunteers are subject to the same regulations as state employees and must submit the appropriate agency support documents.

Reimbursement for Incidental Expenses

The Volunteer Act allows for incidental expenses that the agency deems appropriate to assist volunteers in the performance of their duties. These requests must be consistent with other state law for allowable expense.

Reimbursement for direct volunteer expenses may be handled through a petty cash fund. To establish a petty cash fund it, is necessary for the agency/district to request written approval from the State Auditor's Office. If a petty cash fund is set up, the volunteer is required to provide a dated and itemized receipt signed by the district liaison. The district liaison should establish a system consistent with agency procedures for payment of expenses from the petty cash fund.

If a petty cash fund is not used, payment and reimbursement for expenses and supplies for volunteers should be handled using current state purchasing regulations. These items should utilize the appropriate DHEC class code and the invoice should state "For Volunteers' Use Only".

Recognition Expenditures

If the agency utilizes a petty cash fund, expenses such as refreshments, coffee, greeting cards, certificates and plaques may be funded from this source. If not, expenditures for supplies relating to volunteer recognition should be budgeted for and purchased by following current state regulations. These items should utilize the appropriate DHEC class code and the invoice should state "For Volunteers' Use Only".

Volunteer Insurance

The Volunteer Act allows the agency to provide liability insurance for volunteers to the same extent as for employees. An agency may cover volunteers under the same insurance policy with its employees through the Division of Insurance Services of the Budget and Control Board. Tort or personal liability insurance protects an employee if sued and found negligent while on the job. Therefore, volunteers (while acting under the scope of their volunteer employment) are provided coverage through the Agency's Tort Liability Insurance policy. When purchasing this insurance from the Division of General Services, the agency is charged a flat rate per employee. Volunteers are considered to be employees for insurance purposes.

An agency may also purchase primary coverage from the Division of General Services which insures all the primary vehicles owned by that agency. By electing to buy primary coverage, the agency is entitled to a secondary coverage at no additional charge. The secondary coverage, also called excess automobile, covers all employees and may cover volunteers while performing their duties in their personal car. If an accident occurs, this insurance will pick up the damages up to a specified limit over and above individual coverage. Volunteers authorized to use a vehicle from the Division of Motor Vehicle Management (Business Management) are also provided the same coverage as state employees. Districts must follow the requirements outlined on the form titled "Volunteer Transportation" for use of vehicles from this Division.

According to the Department of Workman's Compensation, a volunteer has no coverage under Agency policy as long as he receives NO renumeration from that Agency. If renumeration is involved, whether in the form of payment for mileage, meals, etc., and there are more than four volunteers state-wide, state coverage is provided by our carrier (S.C. Workman's Compensation Fund). Accident insurance which covers volunteers in case of an accident while on the job is recommended. Corporate Insurance Management offers this coverage through the Volunteer Insurance Service. This accident insurance covers the volunteer up to $1,000,000 in excess of their own coverage.

An agency may also consider purchasing automobile and personal liability insurance through the Volunteer Insurance Service. This coverage is comprehensive and it may be less expensive than that purchased by the state agency. It is available to any private or non-profit agency. For further information contact:

Corporate Insurance Management
216 South Peyton St.
Alexandria, VA 22314
1-800-468-4200

Community Linkages

The Home Care program will serve as the management and operational base of the volunteer program. However, the potential range of services offered by the program to the clients will probably require establishing working relationships or linkages with other community organizations. This can be accomplished by holding discussions about the program with the organizations listed in the (previously developed) directory. The working relationship need not be formal. They can be simply and understanding that as clients are identified as being in need of services provided by these organizations, they will be referred to them. For example, a client who may be eligible for Meals On Wheels will be referred to that group. As time passes and the participants work together, these linkages will be established. Also, the development of the community awareness program will further strengthen the community linkages.

Community Awareness Plan

A major function of the volunteer program is to improve the public understanding of home care services. Therefore, districts may want to develop a community awareness program, if one does not already exist. It should be structured to acquaint the community with home care operations and volunteer services.

Most community awareness programs include the following three components:

1. Inform community organizations about the program and specific health issues.
2. Media campaign to alert prospective volunteers and clients who may wish to participate.
3. Recognition activities to maintain volunteer enthusiasm.

Usually, many elements of the community will have been involved in the preliminary planning for the program. One of the responsibilities of the coordinator is to keep all social service agencies, city and county officials and the media fully informed about the development, growth and success of the program. A speakers' bureau is an excellent vehicle for this. Volunteers' activities can be advanced through public speaking appearances before clubs, religious groups and meetings with local and other state governmental units.

In most communities, there is an established media network consisting of organizational newsletters, community activity publications, radio and television. Materials can be prepared which describe the program, its services, how it operates and who is eligible to participate as volunteers and clients. A media campaign can be developed identifying the material to be distributed and the most appropriate means of doing so. Once the campaign is planned and implemented, its replication is not difficult. Furthermore, the costs of such activities are often absorbed as a public service by the media. Recognition of particular accomplishments by volunteers is particularly important. Basic informal recognition should to be continuous and can be offered in many ways. Providing competent and thoughtful supervision,

offering praise, and giving assignments that are increasingly satisfying are just a few ways. In addition, a public recognition program is a means by which volunteers can be formally honored for their service. Recognition events should be arranged at least semi-annually. They may consist of special ceremonies, teas, luncheons and recreational outings during which awards can be made to the volunteers and others who have provided exceptional community support for the program.

Community contributions to these activities enhance the quality of the ceremonies and provide a means for local participation in the program. Contributions need not be monetary; donations for space, food, decorations, incentives and transportation are to be encouraged. To emphasize the importance of the occasion, your personnel as well as municipal officials and officers of significant local organizations should be invited.

Examples of recognition materials that can be used include:

1. Name tags for volunteers at enrollment for identifications of assignments.
2. Pins for three months of service.
3. Certificates for one year of service.
4. Certificates for individuals or organizations for outstanding support of the program.

Each of these activities will help secure the community participation in and support for both the volunteer and the Home Care program. They may also provide additional benefits by helping to identify qualified volunteers and potential clients.

Evaluating Volunteers

It is critical that the individuals serving as volunteers perform their activities well and that their performance be evaluated periodically. This provides information on services for the districts as well as a positive reinforcement tool for the volunteer. To do so requires monitoring two aspects of the volunteers' activities--working with clients and complying with the home care program's operational requirements.

In evaluating the ability of the volunteer to work with clients, you can use the previously described volunteer responsibilities to the clients. The ability of the volunteers to comply with these criteria will help determine their overall evaluation. In addition, districts should develop an evaluation for periodic assessment of volunteer performance (see Forms for sample).

Equally important, volunteers should be given an opportunity to present their views about their assignments also. The Forms section provides a volunteer assignment evaluation form on which volunteer comments can be made about their participation in the program. This information should be discussed with the individual volunteer and appropriate supervisory personnel.

Reporting and Recordkeeping

The reporting activities should be straightforward and consistent with existing recordkeeping and reporting systems which are already in place. Detailed procedure and forms for reporting and recordkeeping should be provided so everyone understands how the systems are maintained. These procedures will be discussed during the staff orientation.

In summary, it is necessary to maintain volunteer and client files, schedules and current transportation forms. The general categories of information usually contained in them are described below.

Volunteer Files

These files should contain information about each volunteer. The Volunteer Application is the first document included in the file. In addition, information such as volunteer enrollment records, client assignments, performance and assignment evaluations, training session attendance, and activity schedules should be included and updated periodically.

Client Files

Individual client files are routinely maintained in home care programs. Each file should contain the initial interview data collected during enrollment, the client assistance plans, volunteer activity reports and appropriate updates. Client files should be reviewed as needed to monitor the client's progress and the volunteers' activities.

Volunteer Schedules

Each volunteer should receive a schedule. The schedule will be based on individual client's needs taken from the client's assistance plans and on the availability of the volunteers.

ORIENTATION AND TRAINING

ORIENTATION AND TRAINING

The success of the volunteer program will be enhanced if it is well received within your organization. This is begun by orienting key personnel to the concept, objectives and structure of the program. Among those personnel will be those selected to serve as supervisors working directly with the volunteers. They should receive additional training concerning actual program operational requirements and how to work with the volunteers. This section provides suggestions for the orientation and training sessions.

Personnel Orientation

The purpose of the personnel orientation is to obtain internal support for the program and to generally acquaint them with it. The orientation can be conducted at a special time or during regularly scheduled staff meetings.

During the orientation, the volunteer coordinator should be identified as well as any supervisors selected to participate. In addition, the following topics should be discussed:

1. The need for volunteers.
2. Services that will be provided by the volunteer.
3. Program structure and individual duties.
4. Volunteers' duties.
5. Contact personnel for your employees to notify should they know of any potential volunteers.

The orientation should be followed with a brief announcement to each department identifying whom to contact for future reference.

Supervisory Orientation

The supervisory training will be more detailed than the general orientation provided to other personnel. The purpose of the training is to prepare your supervisors to work with and manage the volunteers. Consequently, the following topics need to be addressed:

1. Purpose and structure of the program.
2. Responsibilities and duties of the supervisors.
3. Responsibilities and duties of the volunteer.
4. Criteria for selecting the volunteer.
5. Scheduling volunteer assignments.
6. Transportation planning.
7. Reporting volunteer time.
8. Techniques for working with volunteers.
9. Materials for training volunteers.
10. Approaches for evaluating volunteer performances.

The exact contents of the supervisors training material will vary according to the districts. Suggested training material will be available from the central office.

Volunteer Training and Orientation

The volunteers will perform to the maximum if they fully understand what is expected of them and if they are provided the information they will be communicating to the clients. This will require conducting periodic orientation programs as the volunteers become enrolled. In addition, in-service training activities should be carried out to address specific areas of their work (turning a patient, etc.).

The following topics are suggested as a guide in developing the volunteer orientation program:

1. Familiarize them with the goal, objectives and operations of the volunteer program.
2. Review the major health problems of the clients.
3. Review the preventative health measures to alleviate specific health problems.
4. Acquaint them with each other and the staff.
5. Provide a synopsis of the program's policies and other administrative procedures which explains what is expected of them.
6. Provide examples of program service responses to the needs, characteristics and problems of the clients served.
7. Provide an overall understanding of the social and psychological characteristics of the client population.
8. Furnish information about other community programs available to serve the client.
9. Discuss the variety of services they will provide and tangible examples of appropriate and inappropriate activities.

The volunteers should have ample opportunity to ask questions and discuss additional information throughout the orientation session.

After deciding how the volunteers will serve the clients, a corresponding training program will need to be developed. Most likely much of this material already exists in the form of client health education courses, videotapes, and printed pamphlets and brochures. It is often effective to include the volunteers in any health education courses provided by the health departments that may be relevant to home care (such as basic first aid).

How do we make Volunteer assignments?

Making an initial assignment can be very time consuming. There are many factors to consider. Keep in mind though that once an assignment is made and it is working, it will take very little to keep it going.

The Volunteer Consultant will assist you with placing the right volunteer with your clients. "Volunteer Bios" will be provided on each volunteer so you will know about your volunteers in advance. You will also be given the opportunity to interview and reject any volunteer you do not think will be able to work with your clients or staff.

Here are some of the factors we consider when making assignments:

Location of Client

The first thing we do is to see if there is a volunteer who lives in the area of the client.

For a volunteer who rides the bus, try to keep him/her on the one bus route nearest his/her home.

Volunteer Preferences

This is a volunteer program. The volunteer has the right to refuse a client if he/she has a good reason. Volunteers have refused assignments for things like: a young male relative who hangs around drinking (the female volunteer felt unsafe); client smokes; client won't put air-conditioning on; client has dog that constantly barks at volunteer.

You must try to keep in mind that if it wasn't for these volunteers many of your clients would go without any service at all.

Some volunteers will not work with dementia patients or may or may not feel comfortable working with someone of the opposite sex, especially if personal care is involved. There are some volunteers who love to cook and others who don't. Some won't work with an incontinent client or do housekeeping.

Volunteer Abilities

Many may be older volunteers, with health ailments of their own. Some cannot lift clients and others get short of breath if they exert themselves. Some volunteers may not read or write.

Experience

We try to match volunteers who have had experience with a particular disease or condition with someone who would benefit by their experience. A volunteer who is a reformed alcoholic might be placed with a recovering alcoholic. A diabetic volunteer might help a newly diagnosed diabetic.

Appearance/Personality/Background

We try to match clients and volunteers who are similar and who may have similar life experiences. Personalities can make or break an assignment.

Schedule

Most volunteers are pretty flexible in their schedules. For the most part they prefer to work in the mornings because of the heat or being afraid to be out when it's dark. We ask clients and volunteers to try to be as flexible as possible and do our best to come up with a schedule that suits everyone.

Client's Preferences

We also consider a client's preferences in making an assignment. Some clients are uncomfortable with a volunteer of the opposite sex. Race is also sometimes a factor here. Volunteers cannot turn down an assignment on the basis of race but we have had clients who have refused services because the only volunteer available was not suitable to them. We will not place a volunteer in a situation where he/she might be taken advantage of or feel uncomfortable.

It is VERY IMPORTANT for us to prove the need for this program if we are ever to see an increase in the funding from State Government or other sources. A substantial client waiting list will help us in this effort.

Other Tidbits:

Home Management Consent Form (see example)

It is necessary for us to have one of these on file if a volunteer is to do these tasks.

Advisory Committee

This program is required to have an Advisory Committee. If you can suggest someone with expertise in aging, health care, recreation, transportation, education or anyone who would be genuinely interested in contributing constructive ideas to make this program a success, please recommend them to the central office staff. Our initial committee will consists of a State Advisory Board subcommittee with the right to invite addtional members.

Volunteer Policy Guide

Once you have signed up to use volunteers in your district you will receive a copy of this guide so that you will understand the policies that the volunteers are working under.

GENERAL INFORMATION ON VOLUNTEER PROGRAMS

JOB DESCRIPTION

Title: Home Health Services Companion

Accountable to: District Coordinator through Rita Pickering

Specific Duties:

1. Regularly scheduled visits
   a. with patient
   b. with family
2. Relieving primary care person
3. Providing transportation if needed
4. Helping with household duties if needed
5. Minimal basic physical care if needed
6. Grief bereavement follow-up
7. Record-keeping and reporting will be required

Qualifications:

1. Age: 18 or older - under 18 requires special permission
2. Education: As necessary to complete assignments
3. Experience: Experience helpful but not required
4. Other:
   a. Adherence to HHS philosophy
   b. Available to fulfill the responsibilities of the job
   c. Willingness to learn about role on the team

Time Requirements: Minimum three month assignment

Benefits: Volunteers have the opportunity to gain practical work experience, learn new skills, meet a variety of people and make a positive impact on the community.

JOB DESCRIPTION

Title: Home Health Services Personal Care Companion

Accountable to: District Coordinator through Rita Pickering

Specific Duties:

1. Feeding, bathing, dressing, grooming
2. Assisting client with walking, getting out of bed, getting to bathroom
3. Accompanying a client to the doctor or nurse for treatment
4. Providing grief counseling
5. Assisting in reality orientation/awareness
6. Encouraging exercise, taking walks with clients, providing information on exercise or recreation

Qualifications:

1. Age: 18 or older - under 18 requires special permission
2. Education: As necessary to complete assignments
3. Experience: Experience helpful but not required
4. Other:
   a. Adherence to HHS philosophy
   b. Available to fulfill the responsibilities of the job
   c. Willingness to learn about role on the team

Time Requirements: Minimum three month assignment

Benefits: Volunteers have the opportunity to gain practical work experience, learn new skills, meet a variety of people and make a positive impact on the community.

Training requirements: All volunteers are required to attend the orientation and training sessions prior to their assignments. Classes will range from 10-20 hours.

Training requirements: All volunteers are required to attend the orientation and training sessions prior to their assignments. Classes will range from 10-20 hours.

JOB DESCRIPTION

Title: Home Health Services Social/Recreation Volunteer

Accountable to: District Coordinator through Rita Pickering

Specific Duties:

1. Providing companionship, talking, listening, playing games
2. Peer counseling
3. Fostering client contact with family and friends
4. Accompanying client to a recreation or social event

Qualifications:

1. Age: 18 or older - under 18 requires special permission
2. Education: As necessary to complete assignments
3. Experience: Experience helpful but not required
4. Other:
   a. Adherence to HHS philosophy
   b. Available to fulfill the responsibilities of the job
   c. Willingness to learn about role on the team

Time Requirements: Minimum three month assignment

Benefits: Volunteers have the opportunity to gain practical work experience, learn new skills, meet a variety of people and make a positive impact on the community.

Training requirements: All volunteers are required to attend the orientation and training sessions prior to their assignments. Classes will range from 10-20 hours.

JOB DESCRIPTION

Title: Home Health Services Nutrition Volunteer

Accountable to: District Coordinator through Rita Pickering

Specific Duties:

1. Preparing food, planning appropriate meals, light grocery shopping, labeling and organizing food

2. Providing health or nutrition information as approved by district office

3. Accompanying client to a nutrition site

Qualifications:

1. Age: 18 or older - under 18 requires special permission

2. Education: As necessary to complete assignments

3. Experience: Experience helpful but not required

4. Other:
   a. Adherence to HHS philosophy
   b. Available to fulfill the responsibilities of the job
   c. Willingness to learn about role on the team
   d. Adherence to the DHEC Nutrition policies

Time Requirements: Minimum three month assignment

Benefits: Volunteers have the opportunity to gain practical work experience, learn new skills, meet a variety of people and make a positive impact on the community.

Training requirements: All volunteers are required to attend the orientation and training sessions prior to their assignments. Classes will range from 10-20 hours.

JOB DESCRIPTION

Title: Home Health Services Home Management Volunteer

Accountable to: District Coordinator through Rita Pickering

Specific Duties:

1. Shopping, doing errands
2. Writing letters, reading, completing forms
3. Light housekeeping
4. Light gardening
5. Assisting with money management
6. Making non-strenuous home repairs/weatherization

Qualifications:

1. Age: 18 or older - under 18 requires special permission
2. Education: As necessary to complete assignments
3. Experience: Experience helpful but not required
4. Other:
   a. Adherence to HHS philosophy
   b. Available to fulfill the responsibilities of the job
   c. Willingness to learn about role on the team

Time Requirements: Minimum three month assignment

Benefits: Volunteers have the opportunity to gain practical work experience, learn new skills, meet a variety of people and make a positive impact on the community.

Training requirements: All volunteers are required to attend the orientation and training sessions prior to their assignments. Classes will range from 10-20 hours.

JOB DESCRIPTION

Title: Home Health Services Information and Advocacy Volunteer

Accountable to: District Coordinator through Rita Pickering

Specific Duties:

1. Providing information about community services
2. Helping clients receive a needed service (food stamps, visiting nurse, SSI, Medicaid, Medicare, etc.)
3. Bringing unmet needs to the attention of community leaders and volunteer station staff and other care providers

Qualifications:

1. Age: 18 or older - under 18 requires special permission
2. Education: As necessary to complete assignments
3. Experience: Experience helpful but not required
4. Other:
   a. Adherence to HHS philosophy
   b. Available to fulfill the responsibilities the job
   c. Willingness to learn about role on the team

Time Requirements: Minimum three month assignment

Benefits: Volunteers have the opportunity to gain practical work experience, learn new skills, meet a variety of people and make a positive impact on the community.

Training requirements: All volunteers are required to attend the orientation and training sessions prior to their assignments. Classes will range from 10-20 hours.

SERVICES NOT PROVIDED BY VOLUNTEERS

1. Supervision of other volunteers unless assigned
2. Clean up after guests
3. Prepare food for person other than client served
4. Extensive shopping
5. Major house cleaning
6. Lift heavy items
7. Mow lawn, wash windows
8. Deposit cash in bank unless appropriate form is on file
9. Advance funds to clients
10. Custodial services normally provided by paid staff
11. Brief, casual contact with a large number of clients
12. Activities usually performed by doctors and nurses

STATE POLICIES REGARDING VOLUNTEER PROGRAMS

Approved by the State Home Health Services Advisory Council
January, 1991

Home Health Services
Policy and Procedures
Section 7160

Subject: Volunteer Services

Policy:

It will be the policy of the Bureau of Home Health and Long Term Care to develop, implement and monitor a volunteer service program in accordance with the established policies and procedures of each division and with those outlined in the DHEC manual.

Purpose:

The General Assembly, through the passage of the South Carolina Government Volunteers Act (Sec. 8-25-20, et seq., Code of Laws of South Carolina as amended 1985) encourages the use of volunteers wherever possible.

The primary purpose will be to develop a comprehensive state-wide volunteer program based on the needs of each district. The volunteer program will enhance client services, publicize the Bureau program through education and public relations and foster improved community relations.

Procedures:

1. The Bureau of Home Health and Long Term Care will assist each district office in assessing which types of services are most needed in their area.

2. The Bureau of Home Health and Long Term Care will provide an operational procedures handbook to each district for purposes of further explaining methods of recruitment, training, orientation, supervision, and evaluating the volunteer program. Additional items covered in the manaual will include, but are not limited to, issues of transportation, liability, insurance, and confidentiality.

3. Individual district plans will be submitted providing an explanation of the duties and responsibilities of the Bureau and of the district prior to the implementation of the district program.

DHEC NURSING POLICY

GUIDELINES FOR UTILIZATION OF VOLUNTEERS
NURSING SERVICES

Research indicates that properly trained and supervised volunteers can effectively perform many assignments. In addition to supplementing public health nursing services, the satisfied volunteer becomes an advocate for our clients and a supporter for our services. The potential for initiating a volunteer program should be explored in each district and where feasible, be appropriately planned and implemented.

Consideration for the following components will increase the probability of success and longevity for volunteer programs.

1. Recruitment:

   - list expected qualifications of applicants including level of education, desired skills or aptitudes, good physical and mental health, and age restrictions, if any.

   - solicate assistance for specific period of time, usually 3-6 months. The contract can be extended at the end of the defined time frame.

2. Screening:

   - interview prospective volunteer to identify motivation, degree of commitment, attitudes toward clients, and previous work or volunteer experiences.

3. Job Descriptions:

   - written job descriptions should clearly outline the expectations of the job and should be mutually acceptable to both parties.

   - duties should not be limited to routine tasks. Challenge and responsibility will increase the satisfaction of the volunteer.

4. Training:

   - the program using the volunteer has the responsibility for training. Personal contact between the nurse and the volunteer strengthens commitment by both parties and promotes a sense of responsibility on the part of the volunteer.

5. Supervision:

   - the nurse using the volunteer is responsible for direct supervision and must be available for consultation at all times.

- the volunteer is accountable for his/her performance and periodic reviews similar to an employee performance review are appropriate. The review provides the opportunity to identify areas of dissatisfaction by either party and make mutually agreed on adjustments.

6. Confidentiality:

   - the importance of respect for confidentiality of information should be stressed at every opportunity.

   - written signed statements regarding confidentiality are not required.

7. Recognition:

   - recognition of voluntary efforts is a necessary component of a successful volunteer program.

   - recognition may consist of awards, coffees, pins, certificates, public mention in news articles or broadcasts.

Reference: State Agency Volunteer Program Manual
Office of the Governor, Division of Volunteer Services--1983

Approved: DHEC Nursing Practice Policy Committee, September 15, 1982
Approved; DHEC Nursing Service, October 21, 1982

Approved editorial changes, DHEC Nursing Service, August 20, 1987

South Carolina DHEC
Department of Health and Environmental Control

HOME CARE SERVICES
Columbia, South Carolina

OPERATIONAL PROCEDURE

Organizational Component

SUBJECT	NUMBER
Volunteer Services Policies and Procedures	7160
	EFFECTIVE OR REVISED DATE
PREPARED BY Rita Pickering	Note: Individual pages may be revised and revised date shown on them.
DATES REVIEWED	APPROVED January 1991

I. PURPOSE:

The purpose of Volunteer Services is to supplement and augment regular district treatment programs and activities through the use of services contributed by volunteers; to serve as a liaison between the district offices and the community; to promote understanding of the Bureau, its services and needs; to foster the development of community resources for the benefit of clients; to provide the community with an opportunity to contribute service and material or monetary gifts to help meet human needs.

II. POLICY

It is the policy of the Bureau to operate a volunteer program for participation by individual and group volunteers; the program to include

such components as determining needs, recruiting, interviewing, screening, orienting, training and recognizing volunteers.

1. Directly under the supervision of the Bureau Director, the Volunteer Services Consultant is primarily responsible for administering, coordinating, and directing the volunteer program.

2. Participation of volunteers must be directly related to needs of clients and be of assistance to the district in providing increased or improved services.

3. Volunteers are given jobs that supplement or complement the work of paid staff.

4. Services of volunteers are perceived as an integral part of the over-all home care program with rights and responsibilities equal to those of paid staff, with the possible exception of legal obstacles or insurance regulations.

5. Records of material and cash contributions are listed in a permanent file. Receipts for cash contributions and tax-deductible items are mailed to donors; value of material contributions is estimated by donor when used for tax purposes.

III. PROCEDURES:

The procedures for use of volunteers include:

1. Assessment of Needs

a. Needs for volunteer services are determined by consultation, cooperation and coordination between Volunteer Services Consultant and staff from other districts.

b. Staff members who wish assistance from volunteers shall forward written requests to Volunteer Consultant, stating type of work, duties, job title, qualifications, number of volunteers, days and hours needed.

2. Recruitment

Methods of recruiting include:

a. Personal and telephone contacts
b. Presentations to groups and organizations
c. Newsletters advertising job opportunities
d. Brochures containing pertinent information in regard to needs for volunteers
e. Contact with outside community resources.
f. Through present active volunteers and staff members
g. News media - radio, newspapers and T.V.

3. Screening and Selection

a. The Consultant screens on the basis of past work and/or volunteer experience, mental capability, physical ability and willingness to work in the specific environment as determined by the District Office.

b. No person is discriminated against because of religion, race, citizenship, national origin, marital status or age - with understanding that 18 years is the minimum unless special arrangements are approved and are in non- patient areas.

c. The screening process includes a written application, a personal interview with the Consultant and a reference check.

d. A physical examination may be required if the Consultant feels such examination is warranted and the Consultant may request that certificates of health be obtained from the Volunteer's personal physician.

e. Volunteers not considered suitable for assignments in this District will be referred to other opportunities and/or will be given a reasonable explanation for not being accepted.

f. The Volunteer Services Consultant shall be responsible for the selection of volunteers with approval of supervisory staff in the area of their assignment

4. Orientation, Training and Supervision

a. Individual volunteers shall receive general orientation from the Volunteer Services Consultant to include:

1. Purpose, philosophy and brief history of the Bureau (Agency)

2. Realities of working with clientele with lifestyles which may differ from theirs.

3. Organizational structure of the Bureau and range of services.

4. Relationship of the volunteer program to the District and role of volunteers.

5. Relationship of the District to other facilities in the agency and to the community.

6. Physical plan of the facilities, location of various services, restrooms, canteen-lounge area, fire and safety equipment, and tour of representative areas.

7. Each volunteer must sign a document which deals with laws of confidentiality and protection of patients' rights. Also,

other rules regulations and operating procedures should be explained.

8. Generally volunteers do not serve as members of treatment teams. Any exceptions would require additional training and advance approval of qualified personnel. Volunteers can serve as Patients Rights' Specialist after training is completed.

b. Staff members shall assist in the responsibilities for necessary training and supervision of volunteers who work within their jurisdiction.

c. Unusual events or incidents that occur during the volunteer visits should be reported to Volunteer Services Coordinator. In life-threatening or emergency situations volunteers are to call for emergency assistance first and notify district personnel immediately after. Unusual events affecting clients that need immediate attention should be reported to supervisor or clinical staff in charge. Otherwise, they should be reported to the Volunteer Services Coordinator.

d. Orientation for group volunteers is the responsibility of the Volunteer Services Consultant and they are under joint supervision of the Volunteer Cosultant and the District Volunteer Coordinator.

e. Volunteers who participate in groups are responsible to the person designated as group leader.

f. Proper supervision and cooperation of clinical staff can help volunteers experience personal development and satisfaction in their work.

g. Volunteer's notes regarding patient(s) are submitted to the supervisor or designated staff for documentation in patients' record if they contain information of therapeutic value.

5. Record Keeping

a. The Volunteer Consultant maintains records of all volunteer services, direct, or indirect, including material and monetary contributions. The records shall include:

1. Individual volunteers:

a. Application
b. Assignments
c. Hours of Services
d. Evaluation
e. Recognition
f. Any other pertinent information

2. Group volunteers:

a. Names of members

b. Schedule
c. Assignment
d. Special events
e. Contributions of gifts
f. Recognition given

b. Monthly reports for Director and Volunteer Services records:

1. Number of individual and group volunteers
2. Number hours of volunteer services
3. Volunteer-related activities
4. Community involvement
5. Staff development in continuing education
6. Work related meetings
7. Number of volunteer interviews
8. Material and monetary contributions
9. Events involving use of the volunteer members

c. Copies of correspondence
d. Job requests and descriptions

6. Evaluation

a. Individual performance evaluations are usually accomplished by conference in cooperation with both the volunteer and the supervisor. Written evaluations become a part of the volunteer's record.

b. Group volunteers are evaluated in cooperation with the Consultant for volunteer groups and the district coordinator with occasional input from clients.

c. Evaluation of the Volunteer Program is an ongoing and continual process done as needs arise and changes occur.

7. Resignations and Termination of Assignments

a. Written notice of resignations is preferable, however, notice may be given in person or by phone. Exit-interviews are helpful for evaluation purposes and an opportunity to personally thank the volunteer and extend best wishes for the future. Certificates, letters of appreciation, and statement of service hours will be mailed to the volunteer.

b. Termination of an assignment may take place and the volunteer released if the volunteer is not productive, violates Bureau regulations, or evaluation is unsatisfactory. A personal conference with the volunteer is advisable in these circumstances.

8. Recognition

The Volunteer Services Consultant is responsible for the appropriate recognition of volunteers who fulfill their commitments. Recognition may be made as follows or may

be a combination of:

a. Written letters of appreciation
b. Presentation of certificates for service
c. Nominations for Outstanding Services given by the Governor, DHEC Voluntary Action Center, and others
d. Reception or luncheon to honor volunteers
e. Articles and pictures in district and departmental newsletters
f. Area news media - radio, T.V., newspapers, etc.
g. South Carolina Department of Health and Environmental Control Award pins

Copies of letters, new articles or notes in reference to the recognition should be filed in the volunteer's folder.

Staff, Location and Work Hours

1. Staff:

a. Volunteer Services Consultant
Certified by National Association for Administrators of Volunteer Services (see Duties and Responsibilities).

b. Coordinator of Volunteers - a volunteer position

Objective: To assist the Volunteer Services Consultant with the program for volunteers.

Major Responsibilities: Meeting regularly with volunteers in their assigned districts to establish closer association and better communications; welcoming new volunteers; improving relations between volunteers and staff: informing and encouraging volunteers in their effort to meet patients' needs; promoting better understanding of home health and serving as a liaison person between the program and the community.

Time: Varies as needed to accomplish the above objectives.

Qualifications: Able to relate well to others; patience, friendliness, and a cheerful disposition; general knowledge of the Bureau, clients and staff.

2. Location and Work Hours:

Office hours are weekdays from 7:30 a.m.-4:00 p.m., plus weekends and evening hours when volunteer activities require the presence of Volunteer Services staff.

The Volunteer Consultant operates out of the Central Office but remains accessible by request or as needed by the District Offices.

Volunteer Coordinator will be located in each District Office and hours will be determined by the Coordinator and district staff.

Duties and Responsibilities of Volunteer Services Consultant:

1. Prepares agency and staff for volunteer program, and determines needs for volunteers.

2. Makes certain that necessary equipment, supplies, and space are available for program.

3. Prepares job descriptions for each volunteer assignment.

4. Plans and supervises overall volunteer program.

5. Recruits and interview volunteers.

6. Selects, orients, and places volunteers.

7. Arranges for staff supervision and training of volunteers.

8. Keeps staff and volunteers informed and help them understand and work together.

9. Evaluates overall program and volunteers' performances.

10. Arranges for recognition of volunteers.

11. Is responsible for public relations and publicity.

12. Administers the volunteer office, including keeping records, preparing reports, and acknowledging all contributions.

13. Attends conferences, workshops, and staff development classes for continuing education in the Volunteer Services field.

14. Serves as liaison between the District, Central Office and other community organizations.

15. Accepts and distributes material and cash contributions to appropriate areas.

16. Arranges for special entertainment and educational programs presented by volunteers.

17. Procures and makes available to staff and volunteers up-to-date information, current books and periodical pertaining to volunteerism.

18 Actively participates in community and state-wide recognition events for volunteers.

Types of Volunteers and their Services

Volunteer Services are contributed by: (1) individuals, (2) groups, and (3) organizations.

They render unpaid services to patients and/or provide material or monetary gifts to be used for the benefit of hospitalized patients. The services may be direct (involving personal contact with the patient) or indirect (providing items or money for patients' comfort, entertainment, or pleasure).

Examples of Volunteer Services Projects:

1. Clothing Closet

   New and used clothing donated for the "Clothing Closet" is distributed at no cost to needy patients who are able to maintain their personal clothing. The closet is staffed by volunteers.

2. Senior Citizens Project

   Volunteers, using their personal vehicles, take patients into the community for rides, shopping, and varied activities for social interaction.

3. Grounds Beautification

   Individuals, garden clubs, and other organizations contribute plants, bulbs, and cash for beautification of health care client's grounds.

4. Visiting Areas

   Volunteers and organizations contribute items to add to the attractiveness of patients' living areas. Example: curtains, living plants, pictures, magazine racks, bed caddies, etc.

5. Operation Santa Claus

   Volunteer contributions at Christmas provide a selected gift with name attached for every patient.

6. National Home Care Week/Volunteer Week

   Volunteer Services coordinates special programs encouraging public interest and support of programs to benefit HCS.

7. "Adopt-A-Patient"

   Individuals or groups may "adopt" a patient (usually one who has no contact from family or friends) for the purpose of visiting as a friend and/or provide certain material or comfort items.

8. Administrative Support

   Individuals assist in office support functions such as typing, mail distribution, records management, receptionist, etc.

VOLUNTEER FORMS

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

VOLUNTEER AGREEMENT
FOR

Name of District_____

Address_____Zip_____

Telephone_____

These parties agree to abide by the attached basic provisions, which become part of this agreement.

THE DISTRICT AGREES TO:

1. Request volunteers in accordance with the following guidelines:

   a. Volunteers cannot displace employed workers

   b. Volunteers cannot be used to conduct or engage in religious sectarian or political activity or instruction; nor can they participate in any construction to be used for religious or policital purposes.

   c. The volunteer district will actively comply with Title VI of the Civil Rights ACT of 1964.

2. Designate a coordinator to serve as liaison with the project staff. The primary professional staff person who will serve as liasion with the Central Office and will be directly responsible for volunteer orientation and supervision is

   _____

   Telephone number_____

   Description of Supervisory Arrangements:

   _____

   _____

   _____

3. Obtain a written "Letter of Agreement" specifying volunteer activities to be performed, prior to each assignment of a volunteer in the home of a client services. This "Letter of Agreement" must be signed by the district coordinator, the person to be served in the home or his/her legal representative(s), and the Volunteer Consultant.

4. Provide specific written care plans for each adult to be served, prior to be served, prior to volunteer assignment.

5. Provide day-to-day supervision of volunteers on assignment in coordination with the central office.
6. Provide volunteers with assignments which use their skills and training.

7. Provide part of pre-service training required for each new volunteer.

8. Assist staff to coordinate quarterly in-service training three hours miniumum per quarter).

9. Interview the potiential volunteer to be sure he/she has the qualifications and capabilities needed by the district. The decision to accept or reject a particular volunteer lies with district personnel.

10. Review each persons' continued need for a volunteer periodically and recommend phase-out or reassignment of a volunteer as necessary.

11. Provide an emergency number for the volunteers to call while on assignment.

12. Validate time sheets and other volunteer reports for submission to the consultant.

13. Submit an annual report to include, but not limited to, types of clients served, supervision and training provided to volunteers, amount of time worked by volunteers, dollar value of their time, and other support provided.

14. Complete an evalution of the performance of each volunteer as needed. Volunteer Consultant may assist if requested.

15. Assist consultant in the coordination of volunteer assignments, orientation, and other project related activities as necessary.

16. Agree to participate in annual Recognition Program held by the central and district office.

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL

HOME CARE SERVICES

THE CENTRAL OFFICE AGREES TO:

1. Attempt to recruit_____(number)volunteers to serve _____ (number)persons with exceptional needs for a time as agreed upon with approval of the Volunteer Consultant in accord with Home Care Services Policy and Procedure.

2. Interview, certify and screen volunteers prior to recommendation to the district.

3. Provide orientation to district staff prior to placement of volunteers and at other times as appropriate.

4. Refer volunteers to the district for individual assignment.

5. Retain full responsibility for the management and fiscal control of the project.

6. Specify activities to be performed by the volunteers under the direction of the district in cooperation with the volunteer consultant.

7. Plan in-service training for volunteers at least once a quarter for 3 hours with assistance from district.

_____

Signature of Home Care Volunteer Consultant

_____

District Representative

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

EXPLANATION OF VOLUNTEER AGREEMENT

2. Description of Supervisory Arrangements

Explain how the volunteers will be supervised. Will a team decide what the volunteer is to do or an individual social worker or nurse? Who will coordinate scheduling and communicate with volunteers and/or clients?

3. The "Letter of Agreement" (LOA) is very important (see sample). Without a completed form a volunteer cannot enter a client's home.

The LOA should be signed by the client whenever possible. We must be certain that the client wishes to have a volunteer in their home and is not persuaded into a situation they do not desire. A situation like that is very hard on the volunteer.

By signing the LOA, the client is requesting the services of volunteers. It should be explained what the volunteer can and can't do and that it is not a guarantee they will receive the service. They should be told that there is no fee for the service.

An LOA should be completed on any client who might benefit from the service of a volunteer. When the LOA is completed and signed, it should be forwarded to the District Coordinator. The Coordinator should then send it on to the Volunteer Consultant office, keeping a photocopy in case it is lost in the mail. Once the volunteer consultant approves the LOA she will return a copy to the district. The volunteer consultant will give a copy to the client when she does her first monitoring visit.

*Waiting List - A file of the copies of completed LOAs should be kept at the district. This will serve as a "waiting list" for volunteer service. This file will serve as a resource list to fill openings as they occur in a volunteer's schedule. All LOAs are kept on file at the Volunteer Consultant's office also. It is VERY IMPORTANT

for us to prove the need for this program if we are ever to see an increase in the funding from State Government or other sources. A substantial client waiting list will help us in this effort.

4. Care Plan

A District representative must prepare a written Care Plan. A sample of a Care Plan is enclosed. Some Districts use this form while others incorporate the volunteer's service into their existing plans. Either way is fine as long as all this information is provided and the tasks that the volunteer is required to do are included. A list of "Inappropriate Activities" for the volunteer is enclosed. Additional items can be added with the Volunteer Consultant's approval.

The assessment of the clients' problem can range from "needs socialization" to any complex diagnosis. The tasks should address the problems.

Districts should complete the Care Plan and forward it with the LOA, keeping a copy for their files. The Volunteer Consultant will approve the Care Plan and then will have the assigned volunteer sign it on the first monitoring visit. If the client has not signed the Plan, the volunteer consultant will have him/her sign it at this time as well.

Care Plan Up-Date - Care plans should be up-dated at least once every six months to reflect changes in client's condition. See #10.

5. Day to Day Supervision

It will be time-consuming at first to set up a volunteer/client pair and establish their schedule. Once this is done, however, little supervision will be necessary. The volunteer will call the district to notify you if there is a change in their schedule. Changes in schedules result from conflicts due to doctor appointment, illness, etc. The district should simply keep a log of when the Volunteer calls in.

Volunteers will also call their district if they are having a particular problem with a client. They will look for advice on what to do or information on who to call to solve such problems. This is part of their "Information and Advocacy"

role. They also call the Volunteer Consultant's office for this kind of guidance. You should look at the volunteer as someone who can do the"leg work" for a client. Give them the phone numbers, leads, etc. and let the volunteer do the calling.

7. Pre-Service Training

All volunteers are required to complete pre-service training before they are placed in client's home. As a district you will be called upon to do a presentation about your services and the clients you serve. If additional training is required, you would include this in your presentation (see In-Service Training). The Pre-Service Training is organized by the volunteer consultant helping to provide trainers, space, equipment, etc.

Some districts may require that volunteers receive additional training specific to the needs of their clients. Examples of these would be Alzheimer's, Hospice, Acute Care, Mental Health, or Drug/Alcohol Dependent clients. The necessity of additional training must be approved by the Volunteer Consultant.

If training needs to be specific to the client, we will attempt to arrange for the volunteer to meet the nurse, therapist, etc. to go over what is needed.

8. In-Service Training

The Volunteer Consultant will coordinate the required quarterly three hour In-service training. The districts may be asked to provide a trainer, space, equipment, etc. All volunteers are required to attend these trainings.

Districts can provide additional training for volunteers if they feel it is necessary. The districts can pull in their volunteers and offer training specific to that district. This would be considered required for those volunteers.

10. Reassessments/Care Plan Up-Dates

Each district must make arrangements to reassess the client's continued need for a volunteer. It is the District Coordinator who will recommend

whether or not the service should be continued. As the demand for the volunteer's service increases, this will be very important in determining which clients have the greatest need and who will be served.

Reassessments should be done at least once every six months or as agreed to by the volunteer consultant. The Care Plan should then be up-dated to reflect any changes in the client's condition or tasks that the volunteer is to perform.

11. The availability of an emergency number for the district is what limits the hours that volunteers can work. If there is a number that the volunteer can call in case of emergency, they <u>can</u> work evenings and weekends if they are willing.

12. <u>Time Sheets (see sample)</u>

Each volunteer keeps a monthly time sheet on which he/she keeps track of his/her hours and travel. Clients are to initial the reverse side. At the end of the month, volunteers mail time sheets to the volunteer consultant after the time has been verified by the District Coordinator's initials. Please return the originals to the central office as quickly as possible. Keep a copy of the time sheets in your file.

13. <u>Volunteer Evaluation</u>

See attached evaluation form.

16. <u>Recognition</u>

All volunteers deserve to be recognized for the valuable work that they do. The central office staff will arrange a recognition event for the volunteers. District staff will be invited to the event. Districts are also encouraged to include their volunteers in any other type of recognition you may have.

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Letter of Agreement

The VOLUNTEER PROGRAM of the Bureau of Home Care Services has been asked by the _____ (District Name) to place a Volunteer in the home of _____ (Client's Name)

_____ (Address)

PHONE: _____

_____ PHONE: _____
(Emergency Contact)

The following services (see Care Plan for details) will be performed under the supervision of the District and Central Office Staff: _____
_____
_____
_____
_____

Volunteer services may be terminated at any time upon request of any of the undersigned parties.

I hereby understand that I am requesting the services of a Volunteer and that these services will be rendered based on availability and concurrence of a volunteer.

_____
Client or Legal Guardian Date

_____
District Representative Date

_____
Volunteer Consultant Date

Proposed Schedule
(Based on Volunteer)
DAY TIME

_____

_____

_____

_____

_____

SC DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Application for Volunteer Workers

District: SSN:

Name	Address	Home Phone / Business Phone

Present Employment	Previous Occupation

Birth Date	Marital Status	No. of Children	Ages of Children

Spouse	Occupation

Education ☐ High School ☐ Business School ☐ College ☐ Other _____ | College Major

Name any societies, clubs, organizations in which you are now, or have been a member.

Church Affiliation | Organization you represent

Previous Volunteer Service (when and where)

Previous hospital work (when and where)

Interests (Check your interests. Place two (2) checks by items you could teach.)

- ☐ Art
- ☐ Baby Sitting
- ☐ Beauty Culture
- ☐ Carpentry/Wood Work
- ☐ Ceramics
- ☐ Crafts
- ☐ Dancing
  - ☐ Ballroom
  - ☐ Square
  - ☐ Folk
  - ☐ Tap
- ☐ Drama
- ☐ Games (plan and direct)
- ☐ Gardening/Nature study
- ☐ Indoor Sports/Games
  - ☐ Bowling
  - ☐ Checkers
  - ☐ Chess
  - ☐ Ping Pong
  - ☐ Pool
  - ☐ Shuffle Board
- ☐ Library Work
- ☐ Literature
  - ☐ Poetry
  - ☐ Reading Aloud
- ☐ Music
  - ☐ Instrument
  - ☐ Singing
- ☐ Needlework
  - ☐ Crocheting
  - ☐ Knitting
  - ☐ Sewing
- ☐ Newspaper Work
  - ☐ Editing
  - ☐ Proof Reading
- ☐ Outdoor Sports
  - ☐ Golf
  - ☐ Softball
  - ☐ Swimming
  - ☐ Tennis

Other interesting program you could present | Type work preferred ☐ With patients ☐ Office or clerical

How much time can you invest? Days Evenings Weekends Holidays | Days preferred | Hours preferred

Can you give this regularly? ☐ Yes ☐ No | How did you hear of the volunteer program?

What are your reasons for seeking volunteer work

List two (2) references with addresses.

(1)

(2)

Do you have any disabilities/limitations? Describe: | What type of transportation will you use?

Person to be notified in case of accident or sudden illness (name, address, telephone)

I consider myself to be in good physical health and capable of this type work.

Date Signature

Approved: | Organization

Date

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SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Group Volunteer Application Form

Date:_____

Name of Group:_____

Permanent Address:_____City:_____County:_____

State:_____Zip Code:_____Phone:_____Parent Organization_____

_____

Contact Individuals

1) Name:_____Position:_____

Address:_____City:_____State:____Zip Code__Phone:____

2) Name:_____Position:_____

Address:_____City:_____State:____Zip Code__Phone:____

_____

Number of Members in Group:_____Age of Members (Indicate No.)
Under 18_____ 18-59_____ 60+_____

Would your group prefer to work directly with clients? Yes____ No____

Specify type of volunteer service you prefer:_____

_____

Availability for Volunteer Work:

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Morning							
Afternoon							
Evening							

_____

Name of current President:_____

When are new officers elected:_____

List of Membership - Attach To This Form.

WE ARE PLEASED THAT YOU HAVE REGISTERED WITH OUR PROGRAM. IN THE EVENT YOU NEED OUR ASSISTANCE, PLEASE FEEL FREE TO CONTACT:

Name:_____Phone:_____
Address:_____

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Volunteer Service Agreement

I agree to serve_____Health Department as a volunteer.
I will work_____(number) hours per week in the following capacity:

I am willing to receive training, supervision, and evaluation by Home Care department staff. I understand that I will be considered a staff member and will be expected to assume such responsibilities as specified above, including attendance at necessary in-service training sessions.

_____ _____
Volunteer's Signature Date

_____ _____
Home Care Department Representative Date

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Volunteer Code of Ethics

As a volunteer, I am subject to a Code of Ethics. I accept my assigned responsibilities and will account for my activities in response to my assignments.

I will make a firm commitment of my time, talents and skills for a definite period of time. I intend to be faithful to my commitment. If I am unable to report for duty, I will notify my supervisor.

I will conduct myself with dignity, courtesy and consideration.

I will consider confidential all information which I may learn directly or indirectly about a client, co-worker, or any member of the staff. I will not seek information regarding a client unless it is essential to my assignment.

I will take any problems, criticism, or suggestions directly to my supervisor or the coordinator of Volunteer Services.

I promise to take to my work an attitude of open-mindedness, to be willing to be trained for it, and to accept supervision.

I am willing to allow extra time for conferences with other volunteers and agency staff supervisors, and also for keeping simple records.

My attitude toward volunteer work will be professional. I know that I have an obligation to my work, to those who direct it, to my colleagues, to those for whom it is done, and the public.

In signing this document, I pledge I will subscribe to the Volunteer Code of Ethics.

_____ _____

Signature of Volunteer Date

UNDERSTANDING BETWEEN
SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
AND
A VOLUNTEER WORKER
CONCERNING
CONFIDENTIALITY OF INFORMATION

I,_____, a volunteer worker, have been
(Print/Type name)
given a copy of the South Carolina Department of Health and Environmental Control policy concerning confidentiality of information* I have read and understand this policy and I will adhere to the principles of confidentiality expressed.

I further understand that any unauthorized disclosure of confidential information by me may result in termination of my work relationship with the Department and may be grounds for civil suit to be brought against me.

Signature_____ Date_____

Witness_____ Date_____

Work location_____

*SC DHEC Manual of Administrative Policy, General Administration Section #8, Information Confidentiality of, pp.9A-11.

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Volunteer Transportation

POLICY:

Before volunteers are utilized to drive agency vehicles, provide transportation for the agency, or drive a client's vehicle, three actions must take place:

1. The potential volunteer's driving record must be reviewed.

2. Proof of motor vehicle liability insurance has to be provided.

3. The volunteer must sign the attached form stating that he/she understands the insurance and liability conditions under which he/she will operate.

PROCEDURE:

Each unit wishing to utilize volunteers for transporting personnel and/or equipment on state business must send the information listed below to Business Management. If the volunteer's driving record meets the criteria required by the Division of Motor Vehicle Management for an employee to drive a state vehicle, and the person is adequately insured, Business Management will forward an authorization to the requesting unit.

Upon receipt of the authorization, the requestor must have the volunteer sign the attached insurance and liability statement. The volunteer can then be utilized in a volunteer transportation program. Note - the unit is responsible for maintaining all records pertaining to the volunteer and providing such in the event of a liability suit/claim.

SEND TO BUSINESS MANAGEMENT:

1. The volunteer's name, driver's license number and date of birth.

2. Proof of Auto Liability Insurance:
   a. A copy of the declaration page, or

   b. The name and address of the insurance company/agent, policy number and expiration date.

I have read the information outlined below concerning the insurance coverage provided me by DHEC should I volunteer to drive my personal vehicle, a state vehicle or that of a DHEC client. Further, I understand that I may incur certain liabilities not limited to those outlined below.

1. If the volunteer is driving a state (DHEC) vehicle, the Agency's insurance will provide the primary coverage and the pay if the claim exceeds $500,000.

2. If no state vehicles are available and the volunteer is authorized to use his/her personal vehicle.

   The volunteer's insurance company would be primary, i.e., responsible for the initial coverage up to the maximum policy limit. After that limit is exceeded, the State's liability insurance would apply in an amount up to $500,000. If a claim/award exceeds the combined limits of insurance, then the volunteer and/or the Agency may be liable.

3. If driving a personal vehicle, the volunteer is responsible for his/her insurance deductible and for the cost of any repairs not covered by private insurance or that of another involved party.

4. The volunteer <u>may</u> incur an increase in insurance premium if using a personal vehicle to transport clients, etc. All volunteers should check with their insurance company prior to performing such tasks.

5. Any damage done while driving a client's vehicle that is not the result of a collision may be a matter between the volunteer and the owner/client. If involved in an accident, the client's insurance would be primary and the State's (DHEC) coverage would be excess over any other valid and collectible insurance covering that vehicle up to the limits provided. The client should provide appropriate DHEC personnel with proof of insurance before anyone is allowed to drive a client's vehicle.

   ***Note - This alternative of using the client's vehicle to transport DHEC clients is not recommended because of the potential liability to Agency and the Volunteer.

_____	_____
Volunteer	Date
_____	_____
DHEC Representative	Date
_____	_____
Witness	Date

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Volunteer Client Care Services

CLIENT_____

ADDRESS_____ Emergency Contacts Desired Work Schedule

_____ Doctor_____ Days_____

PHONE:_____ Phone_____ Hours _____

DIRECTIONS_____ Other_____ Duration_____

_____ Phone_____ The client's status an the continued need for volunteer will be monitored by the district.

DOB:_____SEX_____M___F____

SSMENT OF CLIENTS" PROBLEMS	VOLUNTEER TASKS: See List of Appropriate Tasks	Other Services Provided to Client (list provider agencies
	Circle: Personal Care, Nutrition, Social Recreational; Home Management; Information and Advocacy Description: 1. 2. 3. 4.	Client's Hobbies/Interests

prepared by:
RICT_____Phone_____
ATURE_____DATE_____
approved by:
NT/REPRESENTATIVE_____DATE

Plan accepted by:
VOLUNTEER PROGRAM Phone_____
SIGNATURE_____Date_____
Assignment accepted by:_____
VOLUNTEER_____Date_____

Plan prepared by: Plan accepted by:
DISTRICT_____Phone_____ VOLUNTEER PROGRAM 9 Phone_____
SIGNATURE_____DATE_____ SIGNATURE_____Date_____
Plan approved by: Assignment accepted by:_____

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

HOME MANAGEMENT CONSENT FORM

I, _____, do hereby authorize Home Care
Client/Representative

Services Volunteer, _____, to:
Volunteer's Name

_____ Shop and run errands

_____ Help pay bills

_____ Assist with banking needs

I am aware that the above situations require the volunteer to handle important financial records or money.

_____
Client/Representative Date

_____
Home care Services Volunteer Date

_____
District Supervisor

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES
ANNUAL VOLUNTEER EVALUATION

Volunteer_____

SUPERVISION AND COOPERATION	ALWAYS	OFTEN	TIMES	SELDOM	NEVER
Volunteer accepts supervision					
Volunteer accepts suggestions and follows through on instructions					
Volunteer seeks supervision when he/she has questions about procedure/activity					
Volunteer cooperates with staff					
Volunteer works well independently					
Volunteer submits paperwork on timely basis					
RELATIONSHIP TO THE CLIENTS					
Volunteer relates well to clients					
Volunteer offers guidance to clients when appropriate					
Volunteer begins new activities with clients					
Volunteer assists clients without insisting					
Volunteer demonstrates happiness working with clients					
APPEARANCE AND ATTENDANCE					
Volunteer's appearance is acceptable					
Volunteer's personal hygiene is acceptable					
Volunteer wears smock and name pin					
Volunteer informs district when absent					
Volunteer serves full assigned hours when present					
Volunteer attends regularly					
Volunteer attends in-service					
ATTITUDES AND PEER RELATIONSHIPS					
Volunteer understands the goals of the district					
Volunteer has a good attitude					
Volunteer works well with others					

COMMENTS: _____

_____

VOLUNTEER SIGNATURE: _____ DATE _____

COMMENTS: _____

VOLUNTEER CONSULTANT SIGNATURE _____ DATE _____

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Volunteer Evaluation of Assignment

Name:_____ Job Title:_____

Supervisor:_____ Date of Service:_____

3-Excellent 2-Good 1-Satisfactory 0-Unsatisfactory NA-Does Not Apply

Circle the appropriate answer:

Personal satisfaction with present job assignment.	3	2	1	0	NA
Job description complies present duties.	3	2	1	0	NA
Orientation and training adequate for patient/client contact.	3	2	1	0	NA
Supervisor's instructions adequate for day-to-day activities.	3	2	1	0	NA
Comfortable relationship with patient/client.	3	2	1	0	NA
Cooperative and positive relationship exists with staff.	3	2	1	0	NA
Cooperative and positive relationships exist with supervisor.	3	2	1	0	NA
Receive adequate recognition for services.	3	2	1	0	NA

Additional Comments:

_____

_____

_____

If exit interview, please state reason(s) for leaving:

_____

_____

Volunteer's Signature:_____ Date:_____

Volunteer Director/Coordinator Signature:

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_____ Date:_____

SOUTH CAROLINA DEPARTMENT OF HEALTH AND ENVIRONMENTAL CONTROL
HOME CARE SERVICES

Volunteer Time Card

NAME: YEAR:

DATE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	T
JAN.																																
FEB.																																
MAR.																																
APR.																																
MAY																																
JUNE																																
JULY																																
AUG.																																
SEPT																																
OCT.																																
NOV.																																
DEC.																																

VOLUNTEER SERVICES MONTHLY REPORT

MONTH_____
County_____

Instructions

Submit one (1) copy to Volunteer Services, State Office, to arrive not later than the 10th of each month. Add monthly sum of each individual Volunteer's hours to determine the total hours.

NUMBER OF INDIVIDUAL VOLUNTEERS AND HOURS BY SERVICE

TYPE OF SERVICES	Volunteers A	Hours Served B	Clients Served C	TYPE OF SERVICES	Volunteer A	Hours Served B	Clients Served C
1. Advisory Committee /Boards				11. Professional Service (medical, legal, etc.)			
2. Baby Sitting-Home				12. Recreation/ Entertainment			
3. Cash Donations				13. Rehabilitation			
4. Clerical Services				14. Religion-Services for clients			
5. Clothing Donations				15. Repair Services			
6. Emergency Services				16. Special Projects/ Fund Raisers			
7.Escort Services				17. Telephone Re-assurance			
8. Excursion Volunteer for Meals/Trips Shopping				18. Transportation			
9. Visiting to Clients				19. Other (specify)			
10. Homemaker Services							
GRAND TOTAL							

TOTAL OF INDIVIDUALS PERFORMING SERVICES DURING THE MONTH	TOTAL OF ALL INDIVIDUAL CASH DONATIONS DURING THE MONTH $	TOTAL ESTIMATED DOLLAR VALUE OF OTHER INDIVIDUAL CONTRIBUTIONS DURING THE MONTH $
DATE SIGNED:	SIGNATURE (VOLUNTEER LIASION)	SIGNATURE (VOLUNTEER CONSULTANT)

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The preceding material should help you and your personnel manage your volunteer program and coordinate their work. In addition, periodic staff meetings should provide ample opportunity to discuss any operational questions that may arise concerning volunteer activities and performance. I am indebted to Harold Knight, health care consultant, for much of the information in this manual, to Vivian Baxter, DHEC Business Management, for liability and insurance information and to the volunteer programs of the Department of Mental Health and Council on Aging for allowing me to adapt material to Home Care Services. My sincere appreciation also to Dorothy Chavis, Eleanor Olden and LaWanda Boston for their technical advice and support.

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